



**Procurement Contracts
Training Manual
PS 2260**

PeopleSoft 9.1

City of Kansas City, Missouri

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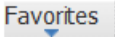











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Tips:

-  
- 
-  to display the Menu
-  set the Auto Complete and Menu sort order
-  reset password, add alternate user id, e-mail address
- 
-    on the Layout Page
- % sign is a wild card in PeopleSoft.
- Clear Cache – Tools > Internet Options > Delete > OK
- Always  from PeopleSoft (upper right corner). Try not to use the .
- P-Cards – purchases can be made with the Department's P-Cards for up to \$1,500 per transaction with a limit of \$10,000 per month.
- Contracts Module does not communicate with Commitment Control.

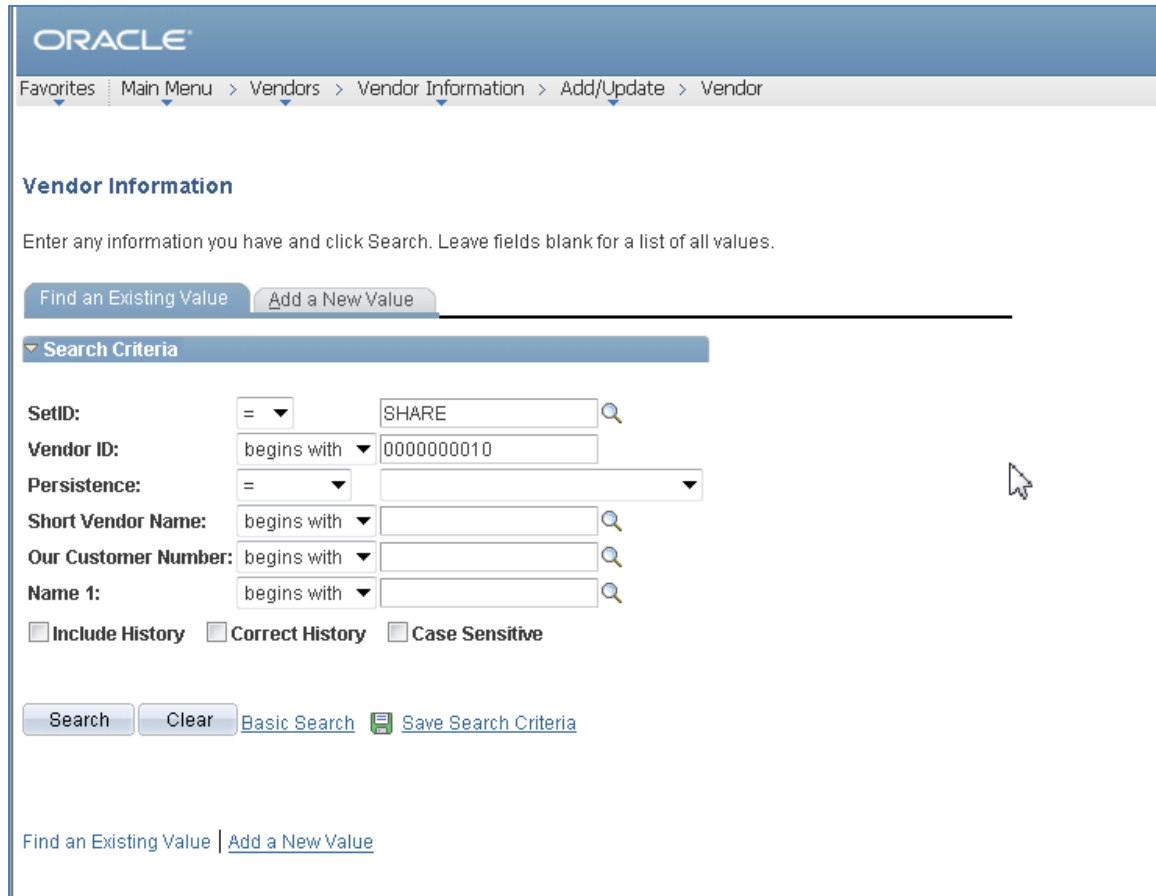


New Features:

- New Page Layout
- Zoom  click Return to go back
- Buyer/Administrator
- Versions
- Renewal Date
- Setup Contract by Categories
- Auto Default
- View Changes



Step 1 - Look up a Vendor:



The screenshot shows the Oracle Vendor Information page. At the top is the Oracle logo and a breadcrumb trail: Favorites > Main Menu > Vendors > Vendor Information > Add/Update > Vendor. Below this is the 'Vendor Information' section with a sub-header 'Vendor Information'. A message states: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section. It contains several search fields: 'SetID' with a dropdown set to '=' and a text box containing 'SHARE'; 'Vendor ID' with a dropdown set to 'begins with' and a text box containing '0000000010'; 'Persistence' with a dropdown set to '='; 'Short Vendor Name' with a dropdown set to 'begins with'; 'Our Customer Number' with a dropdown set to 'begins with'; and 'Name 1' with a dropdown set to 'begins with'. Each text box has a magnifying glass icon. Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' (with a floppy disk icon). At the very bottom of the page are links for 'Find an Existing Value' and 'Add a New Value'.

Enter the Vendor ID on this page

Click 



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ORACLE®

Home | Worklist

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Summary | Identifying Information | Address | Contacts | Location | Custom

SetID: SHARE

Vendor ID: 0000000010

Vendor Short Name: BILLS FLOO BILLS FLOO-001

Vendor Name: BILLS FLOOR MACHINE SERV

Order: BILLS FLOO-001
1225 TRACY
KANSAS CITY, MO 64106

Remit To: BILLS FLOO-001
1225 TRACY
KANSAS CITY, MO 64106

Status: **Approved**

Persistence: Regular

Classification: Outside Party

HCM Class:

Open for Ordering: **Yes**

Withholding: [Yes](#)

Last Modified By: mshah

Last modified date: 10/18/2013 8:35AM

Created By:

Created Date/time:

Last Activity Date: 11/11/2013

Save Return to Search Notify Add Update/Display Include History Correct History

Summary | Identifying Information | Address | Contacts | Location | Custom

A vendor must have Approved Status to do business with the City.

View other Tabs for more information.



Step 2 – Create a Contract:

Major steps in creating a contract are:

- Select the Contract Type
- Enter general information
- Select Contract Purpose
- Select Contracting Business Unit and Owning Business Unit
- Approve and save contract



Select Contract Type:

To create a contract, navigate to:

Procurement Contracts > Add/Update Contracts

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Procurement Contracts | Add/Update Contracts

New Window ? Help http

Contract Entry

Find an Existing Value | Add a New Value

SetID: SHARE

Contract ID: NEXT

Contract Process Option: General Contract

Add

Find an Existing Value | Add a New Value

Note: Contract link is called Procurement Contracts and is outside of the Purchasing Link

SetID – ALL contracts must be entered under **SetID 'SHARE'**.

Contract ID – User can either SKIP THIS FIELD. (The system will assign the next Contract number automatically when the contract is saved). Or users can enter their own department contract numbers.

Contract Type – Select "General Contract". This is the default option. Other options can be selected. Almost 90% are General Contracts.

Click 



To look up an existing contract, select [Find an Existing Value](#) and go to the "Contract ID" field and enter the contract number and click search.

Navigation: Procurement Contracts > Add/Update Contracts

Click the [Find an Existing Value](#) tab

ORACLE

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

SetID: = SHARE

Contract ID: begins with

Contract Version: =

Version Status: =

Contract Process Option: =

Short Vendor Name: begins with

Vendor Name: begins with

Master Contract ID: begins with

☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)



City of Kansas City, Missouri Procurement Contracts Training Manual

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

New Window ? Help http

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

SetID: = SHARE

Contract ID: begins with

Contract Version: =

Version Status: =

Contract Process Option: =

Short Vendor Name: begins with

Vendor Name: begins with

Master Contract ID: begins with

☐ Correct History ☐ Case Sensitive


Search Clear Basic Search Save Search Criteria

Search Results

Only the first 300 results can be displayed.

View All

SetID	Contract ID	Contract Version	Version Status	Contract Process Option	Vendor ID	Short Vendor Name	Vendor Name	Expire Date	Contract Status	Master Contract ID
SHARE YAGCC-112806		1	Current	General	0000046091	RED ECHO G-001	RED ECHO GROUP INC	01/05/2007	Closed	(blank)
SHARE WX 12 07		1	Current	General	0000018157	FIRST-001	FIRST PRIORITY INVESTMENTS INC	04/30/2008	Canceled	(blank)
SHARE WWD8129AMENDMENT4		2	Draft	General	0000002732	SHAHER KLL-001	SHAHER KLINE & WARREN INC	04/30/2011	Open	(blank)
SHARE WWD8129AMENDMENT4		1	Current	General	0000002732	SHAHER KLL-001	SHAHER KLINE & WARREN INC	04/30/2010	Approved	(blank)
SHARE WSDUTILITY0801A		1	Current	General	0000003673	MISSOURI D-002	MISSOURI DEPARTMENT TRANSPORTA	10/31/2008	Approved	(blank)
SHARE WSDUTILITY0801		1	Current	General	0000027335	DIRECTOR C-004	DIRECTOR OF REVENUE -CREDIT ROAD FUND	10/31/2008	Canceled	(blank)
SHARE WSDUSARMYCORP889003209		1	Current	General	0000003214	U.S ARMY C-001	U.S ARMY CORPS OF ENGINEERS	12/31/2013	Open	(blank)

Short Vendor Name – You can enter the contract ID or alternatively, enter the short vendor name or look up  the name.

PeopleSoft applications also support wildcard (%) character to help you search for data in character fields. You can use the wildcard to track down the exact information that you need. A wild Card which is a % sign can be used if a specific name or number is not known.

For example, if you enter WSD%, as the Contract ID, the system returns a list of Contract IDs that begin with WSD followed by #s or letters.

Do not select the ☐ **Correct History** field unless you are changing the contract.

Click **Search**. A list of contracts will come up. Select the contract you want to update.



Step 3 – Enter General Information:

ORACLE

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

Contract Entry

Find an Existing Value | Add a New Value

SetID: SHARE

Contract ID: NEXT

Contract Process Option: General Contract

Add

[Find an Existing Value](#) | [Add a New Value](#)

To create a new Contract, the contract page will navigate to the **Add a New Value** tab

Contract ID can be entered or assigned by the System

Contract Process Option will default to General Contract. 90% of the Contracts in the System are General Contracts

Click **Add**



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ORACLE

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

Contract Entry

Contract

SetID: SHARE [Copy From Contract](#)

Contract ID: NEXT

*Status: Open

Administrator/Buyer:

Contract Version

Version: 1 Status: Current

[New Version](#) Approval Due Date:

Header

Process Option: General Contract

*Vendor: [Vendor Search](#)

*Vendor ID:

*Begin Date: 11/24/2013

Expire Date:

Renewal Date:

Currency: USD [CRRNT](#)

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

☐ Tax Exempt

[Add Comments](#) [Activity Log](#)

[Contract Activities](#) [Document Status](#)

Primary Contact Info [Thresholds & Notifications](#)

[Contract Releases](#)

[KCM Contract Data](#)

Amount Summary

Maximum Amount: 0.00 USD

Line Item Released Amount: 0.00

Category Released Amount: 0.00

Open Item Released Amount: 0.00

Total Released Amount: 0.00

Order Contract Options

☒ Allow Multicurrency PO ☐ Allow Open Item Reference

☒ Corporate Contract ☐ Adjust Vendor Pricing First

☐ Lock Chartfields ☐ Price Can Be Changed on Order

[PO Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

☐ Must Use Contract Rate Date Rate Date: 11/24/2013

☒ Auto Default

*Dispatch Method: Print [Dispatch](#)

Voucher Contract Options

Invoice Number:

AP Business Unit:

Accounting Template:

Payment Terms ID:

Basis Date Type:

Gross Amount: 0.00 USD

Freight Amount: 0.00

Sales Tax Amount: 0.00

VAT Amount: 0.00

Misc Charge Amount: 0.00

[Miscellaneous Charges](#) [Retention](#)

Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

Lines

Detail | Order By Amount | Item Information | Default Selected | Release Amount | Release Quantities | Line Groupings

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1						<input checked="" type="checkbox"/>	Active

[View Category Hierarchy](#) [Category Search](#)

Contract Categories

Lines

Detail | Pricing Options | Release Amount

Line	Category	Description	Status
1			Active

The new Contract Page looks different. There are no multiple Tabs as in 8.9

However, There are new features including;

[Contract Categories](#). There is a [Contract Change History](#) Link visible, when a change is made to a contract.



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You can navigate to the [Contract Change History](#) link from the [Review Contract Information](#) Link as well.

The **KCM Contract Data** [KCM Contract Data](#) Link is now on the Header Page. Click this

Link to add the [*Contract Purpose](#) , [Contracting Business Unit](#) and the [Owning Business Unit](#)

ORACLE

Favorites Main Menu > Procurement Contracts > Add/Update Contracts

SetID: SHARE Contract ID: NEXT Version: 1

*Contract Purpose Ordinance

Contracting Business Unit Owning Business Unit Project

Project Manager Phone

Additional Information

HRD Approved Contract Utilization Plan

MBE CUP %	<input type="text"/> 0.00	MBE CUP \$	<input type="text"/> 0.00
WBE CUP %	<input type="text"/> 0.00	WBE CUP \$	<input type="text"/> 0.00
DBE CUP %	<input type="text"/> 0.00	DBE CUP \$	<input type="text"/> 0.00

[Vendor Contact Information](#)

OK Cancel Refresh




The description of the Contract page is divided into sections that describe contract header and contract line fields along with links to other contract features. Sections that are available for use on this page are:

- Basic information about the contract.
- Contract version when version control has been implemented.
- Header information.
- Amount summaries.
- Order contract options.
- Voucher contract options.
- Contract items.
- Contract categories.

Process Option - The process option displays that you selected before you entered the Contract page.

Administrator/Buyer - Select a user who can serve as the contract administrator or as the buyer for this contract. These terms are used differently for PeopleSoft Purchasing contracts (buyer) and Supplier Contract Management contracts (contract administrator).

Contract Version - Use this section to manage and review versions of a contract. Contract versions enable you to create and maintain multiple versions of the contract in the system. Versions facilitate viewing information in older contract versions. You can modify a forward-looking version (Draft version) of the contract while keeping the Current version active and available for transactions in the system.


Vendor / Vendor ID – Select the short vendor name or Vendor ID. Lookup  can also be used to select the vendor. Verify that the correct / vendor is selected at the proper location. Only valid vendors will be available to select.

Status – The contract status will automatically default to *Open*. Available statuses are:

- ***Open*** – Indicates the initial status of the contract - not yet approved. A contract must be in an *Open* status in order to make changes to it.



- **Approved** - Only contracts with an approved status can be released.
- **On Hold** - Identifies the contract as being on hold - not eligible for releases.
- **Closed** - Indicates the completion of the term of the contract - no longer eligible for releases.
- **Canceled** - Identifies the contract as being canceled.

Primary Contact – Use lookup  to select the vendor's contact person, if one has been set up in the vendor file. Select the vendor contact for the contract.

Description – Enter a brief description for the contract.

Master Contract ID – LEAVE BLANK.

Maximum Amount – Enter a value to specify a total amount that this contract should not exceed. The total released amount of all lines plus the amount released for open items must not exceed this amount. This value is expressed in the contract header currency.

Total Line Released Amount - Displays the total released amount of the contract. This is the open item plus the total of the line amounts. This amount is updated during the PO Calculations process, online purchase order creation, and the PeopleSoft Payables Batch Voucher process when the contract is referenced. This amount is expressed in the contract header currency.

Open Item Amount Released - Displays the amount that is released for open items in an open item contract. This information appears only if the contract is referenced on a purchase order using open item referencing. You do not need to reference an open item contract. The system can do it for you during the PO Calculations process. This amount is updated during the PO Calculations process or online purchase order creation. This amount is expressed in the contract header currency.

Total Released Amount - The current total amount of all releases for the contract. This field appears only in Update mode.

Vendor Ref – LEAVE BLANK.

Tax Exempt – It can be left blank or add a Check ✓ to the box. Tax exempt ID is required, if the box is checked.



Begin Date – Defaults to the current date. This can be changed if the contract will begin at a later date.

Expire Date – Enter the expiration date for the contract.

Renewal Date - Enter a contract renewal date. This is an optional field that indicates when a contract is up for renewal. If you enter a renewal date, it should be later than the current date, and if a contract expiration date exists, then the renewal date should be before or equal to the expiration date.

The system can notify you if you want to be warned when the renewal date approaches. You use the Thresholds & Notifications link to set up this notification.

New Version - Click to create a new Draft version of a contract. The New Version button is available only when the Current version is in an Approved status and a Draft version does not exist. If you click the New Version button, the system enables you to either save your changes and continue, or cancel and go back to the Current version. When you create a new Draft version, the system creates change transactions that show the new version as a change transaction to the old version. In other words, the change is recorded using the prior version as a change, not the new version.

Delete Version - Click to delete the Draft version. The Delete button is available only when you are viewing a Draft version. When you select to delete the version, the system displays a message to verify that you want to delete the version and provides you the option to proceed or cancel. During the deletion process, the system removes the Draft version and returns to the Current version.

Approval Due Date - Enter the date on which this contract version should be approved. This field is available when the contract status is Open and the version has never been approved. When you approve a contract, the system updates the field with the approval date and displays the Approved Date field. You can set up workflow notifications for approvals to remind approvers when this date approaches.

Approved Date - Displays when the contract version was approved. For upgraded contracts, the date is set to the contract begin date.



Order Contract Options

Allow Multicurrency PO – Defaults with a check. Remove the check mark. City does not use multi-currencies for transactions.

Corporate Contract – Default with a check to make this contract apply to all business units within the specified setID. If you do not select this option, you must enter a list of valid business units for this contract on the PO Defaults page.

Allows Open Item Reference – Box must be checked. Whether you are defining an open or fixed item contract, this option enables you to reference this contract for any Purchase Order item ordered from this vendor within the terms and limits of this contract.

Rate Date – Use the default.

Adjust Vndr Pricing First – Leave blank.

Price Can Be Changed on Order – Leave blank.

Auto Default - Select to make this contract available to automatically supply a purchasing requisition and purchase order transaction. This check box is selected by default, if you deselect the check box, requesters and buyers must manually select the contract on transactions, rather than have the system find them automatically.

In addition, the business unit setup must enable automatically supplying a contract to a requisition, purchase order, or both. Select the Default Contract on Requisition and Default Contract on PO check boxes to enable the automatic default. The system searches for and ensures that the current, approved contract is selected for use with the transaction.

The contract process option must be purchase order, general, or release-to-single PO only and the vendor on the contract must match the vendor on the transaction.

Dispatch Method – Defaults to Print.

Setting Up Contract Categories - When you link a category or a group of categories to a contract, requisitions and purchase orders can reference the contract with any items within those categories



Vendor Information:

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

New Window | Help | Personalize Page | http

Vendor Search

Search Criteria

Name: ShortName:

Alternate Vndr Name:

City: State:

Country: Postal:

Class: Type:

Max Rows:

1 to 10 of 21

Search Results Personalize | Find | View All | First 1.4 of 10 Last

Sel	Vendor ID	Address	Short Vendor Name	Name 1	Withholding Applicable
<input checked="" type="checkbox"/>	0000000017	1 INDUSTRIAL-001	INDUSTRIAL-001	INDUSTRIAL FABRICS CORP	N
<input type="checkbox"/>	0000000017	2 INDUSTRIAL-001	INDUSTRIAL-001	INDUSTRIAL FABRICS CORP	N
<input type="checkbox"/>	0000000017	3 INDUSTRIAL-001	INDUSTRIAL-001	INDUSTRIAL FABRICS CORP	N
<input type="checkbox"/>	0000010499	1 INDUSTRIAL-018	INDUSTRIAL-018	INDUSTRIAL LUMBER CO	N

Vendor Detail **Address**

Type in the "Short Name" for the vendor

Click

A list of all of the "Short Name" vendors will appear. Scroll down until you see the vendor you. In the above example, two Vendors are displayed. One of the Vendor has three addresses so it is listed three times.

Add a check mark and click .

You can click the [Vendor Detail](#) and [Address](#) links to verify information.

The [Vendor Detail](#) link will provide the vendor status information, so you do not have to navigate to the Vendor Module on the Menu



SetID: SHARE **Contract ID:** 0000000000000000000000004273 **Version:** 1

*Contract Purpose Contracting Business Unit Project Manager Additional Information	Annual Maintenance Renewal Annual Maintenance Renewal Art Purchase Commodity Common Service Construction Construction Management Cooperative Agreement Demolition Design Professional Service Design/Build Facility Repair & Maintenance General Services KC-Go Lead Abatement Lease Non-Municipal Professional/Technical/Special Service Maintenance Small Construction < \$300 K Small Design Prof. < \$100 K Tenant Reimbursement Work Order	Ordinance <input type="text"/> Project <input type="text"/> Phone <input type="text"/> on Plan 0.00 0.00 0.00
	Vendor Contact OK Cancel	

The following fields can be populated, but are not mandatory:

Project – enter the Project ID for the contract.

Phone – Enter phone number for the Project Manager

Procurement Contract Class



Change the **Status** on the Header from *Open* to *Approved*.

Click  Save

NOTE: Once the contract is in 'Approved' status, the fields are not available for editing.



Step 6 –Create a New Version:

The screenshot shows the Oracle Procurement Contracts interface. The 'Contract Entry' form is displayed with various fields for contract details. A 'New Version' button is visible in the 'Contract Version' section. A message dialog box is open, stating: 'Contract must be saved before a Draft can be created. (10400,577)'. The message also includes instructions: 'Contract must be saved before a Draft can be created. Hit Yes to proceed with Saving the contract and creating a Draft version. Hit No to cancel out and continue working with the Current version.' The dialog box has 'Yes' and 'No' buttons.

Contract Entry
Contract

SetID: SHARE
Contract ID: 0000000000000000000000004273
*Status: Approved
Administrator/Buyer: accounts
Finance Accounts

Contract Version
Version: 1
Status: Current
Approved Date: 11/22/2013
New Version

Header
Process Option: Purchase Order
*Vendor: INDUSTRIAL-001
*Vendor ID: 000000017
Begin Date: 11/02/2013
Expire Date: 06/01/2014
Renewal Date: 06/01/2014
Currency: USD CRRNT
Primary Contact: 1 Dee Vercruysse
Vendor Contract Ref:
Description: abcde
Master Contract ID:
☐ Tax Exempt

Message
Contract must be saved before a Draft can be created. (10400,577)
Contract must be saved before a Draft can be created. Hit Yes to proceed with Saving the contract and creating a Draft version. Hit No to cancel out and continue working with the Current version.
Yes No

Order Contract Options
☐ Allow Multicurrency PO
☒ Corporate Contract
☐ Lock Chartfields
☒ Allow Open Item Reference
☐ Adjust Vendor Pricing First
☒ Price Can Be Changed on Order
☐ Must Use Contract Rate Date
☒ Auto Default
*Dispatch Method: Print
Rate Date: 11/22/2013
Maximum Amount: 11.00 USD
Line Item Released Amount: 0.00
Category Released Amount: 0.00
Open Item Released Amount: 0.00
Total Released Amount: 0.00
Remaining Amount: 11.00
Remaining Percent: 100.00
Price Adjustment Template

Click **New Version** to create a new version of the Contract

The above message will be displayed

Click **Yes**



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Contract Entry

Contract

SetID: SHARE
Contract ID: 0000000000000000000000004273
*Status: **Open**
Administrator/Buyer: accounts

Contract Version

Version: **2** Status: **Draft**
Delete Version Approval Due Date: **31**

Header

Process Option: Purchase Order
*Vendor: INDUSTRIAL-001
*Vendor ID: 0000000017
*Begin Date: 11/02/2013
Expire Date: 06/01/2014
Renewal Date: 06/01/2014
Currency: USD
Primary Contact: 1 Dee Vercruysse
Vendor Contract Ref:
Description: abcde
Master Contract ID:
☐ Tax Exempt

Order Contract Options

☐ Allow Multicurrency PO
☒ Corporate Contract
☐ Lock Charfields
☒ Allow Open Item Reference
☐ Adjust Vendor Pricing First
☒ Price Can Be Changed on Order
☐ Must Use Contract Rate Date
☒ Auto Default
*Dispatch Method: Print
Rate Date: 11/22/2013

Amount Summary

Maximum Amount: 11.00 USD
Line Item Released Amount: 0.00
Category Released Amount: 0.00
Open Item Released Amount: 0.00
Total Released Amount: 0.00
Remaining Amount: 11.00
Remaining Percent: 100.00

The Contract Status becomes

*Status: **Open**

Version # changes to

Version: **2**

Option to **Delete Version** the Version is available. If you click **Delete Version**, the Contract restores the last version status.

Version Status is

Status: **Draft**

The Approval Due Date:

31 is blank

I added the Category to the:

Contract Categories					
Lines					
Line	Category	Description	Status		
1	61500	Office Supplies, General	Active	X	+

Clicked





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ORACLE®

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Procurement Contracts | Add/Update Contracts

*Status: **Open** [Delete Version](#) Approval Due Date:

Administrator/Buyer: Finance Accounts

Header

Process Option: Purchase Order [Add Comments](#) [Activity Log](#)
*Vendor: INDUSTRIAL-001 [Vendor Search](#) [Contract Activities](#) [Document Status](#)
*Vendor ID: 0000000017 [INDUSTRIAL FABRICS CORP](#) [Primary Contact Info](#) [Thresholds & Notifications](#)
*Begin Date: 11/02/2013 [Contract Releases](#) [View Changes](#)
Expire Date: 06/01/2014
Renewal Date: 06/01/2014
Currency: USD [CRRNT](#)
Primary Contact: 1 [Dee Vercruysse](#)
Vendor Contract Ref:
Description: abcde
Master Contract ID:
☐ Tax Exempt

KCM Contract Data

Amount Summary

Total Released Amount:	1.00	USD
Remaining Amount:	0.00	
Remaining Percent:	0.00	

OK

Order Contract Options

☐ Allow Multicurrency PO ☒ Allow Open Item Reference ☐ Must Use Contract Rate Date Rate Date: 11/22/2013
☒ Corporate Contract ☐ Adjust Vendor Pricing First ☒ Auto Default
☐ Lock Chartfields ☒ Price Can Be Changed on Order
[PO Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#) [Dispatch Method:](#) [Print](#) [Dispatch](#)

Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

Lines

Personnel | Find | View All | [Print](#) | [F11](#) | 1 of 1 | [View](#)

The new version requires a new Purpose for the Contract in the [KCM Contract Data](#) link

Added a new Purpose



Click



City of Kansas City, Missouri Procurement Contracts Training Manual

ORACLE®

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

New Window ? Help Personalize Page http

Contract Entry

Contract

SetID: SHARE
Contract ID: 0000000000000000000000004273
Status: **Approved**
Administrator/Buyer: accounts Finance Accounts

Contract Version
Version: 2 Status: Current
Approved Date: 11/24/2013
[New Version](#)

Header

Process Option: Purchase Order
Vendor: INDUSTRIAL-001
Vendor ID: 0000000017 INDUSTRIAL FABRICS CORP.
Begin Date: 11/02/2013
Expire Date: 06/01/2014
Renewal Date: 06/01/2014
Currency: USD CRRNT
Primary Contact: 1 Dee Vercruysse
Vendor Contract Ref:
Description: abcde
Master Contract ID:
☐ Tax Exempt

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[View Changes](#)
[KCM Contract Data](#)

Amount Summary

Maximum Amount:	11.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	0.00
Remaining Amount:	11.00
Remaining Percent:	100.00

Order Contract Options

<input type="checkbox"/> Allow Multicurrency PO	<input checked="" type="checkbox"/> Allow Open Item Reference	<input type="checkbox"/> Must Use Contract Rate Date	Rate Date: 11/22/2013
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default	
<input type="checkbox"/> Lock Chartfields	<input checked="" type="checkbox"/> Price Can Be Changed on Order	*Dispatch Method: Print	Dispatch

[PO Defaults](#)
[Add Open Item Price Adjustments](#)
[Price Adjustment Template](#)

The Version Status becomes **Status:** Current

The **Approved Date:** 11/24/2013 date is the current date

On the **Contract Header** Tab, the new version value is displayed



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Contract Entry Contract

SetID: SHARE

Contract ID: 000000000000000000000004273

*Status: Approved

Administrator/Buyer: accounts

Contract Version

Version: 1

New Version

Status: Current

Approved Date: 11/22/2013

Finance Accounts

Header

Process Option: Purchase Order

*Vendor: INDUSTRIAL-001

*Vendor ID: 0000000017 INDUSTRIAL FABRICS CORP.

Begin Date: 11/02/2013

Expire Date: 06/01/2014

Renewal Date: 06/01/2014

Currency: USD CRRNT

Primary Contact: 1 Dee Verduynse

Vendor Contract Ref:

Description: abcde

Master Contract ID:

☐ Tax Exempt

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Amount Summary

Maximum Amount: 11.00 USD

Line Item Released Amount: 0.00

Category Released Amount: 0.00

Open Item Released Amount: 0.00

Total Released Amount: 0.00

Remaining Amount: 11.00

Remaining Percent: 100.00

KCM Contract Data

Order Contract Options

☐ Allow Multicurrency PO

☒ Allow Open Item Reference

☐ Must Use Contract Rate Date

☒ Corporate Contract

☐ Adjust Vendor Pricing First

☒ Auto Default

☐ Lock Chartfields

☒ Price Can Be Changed on Order

*Dispatch Method: Print Dispatch

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Local intranet | Protected Mode: Off

125%

Click [View Changes](#)



The above screen will open. You can navigate to this screen from the following

Review the **Version**, **Sequence**, **Change Type**, **Value**, **Modified By** and the **Last Changed** for the Contract.



Click the **Contract Category** to look up Contract Category changes.

[illegible]

You need a valid e-mail address in the Vendor Contact file.



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